

Tasks and Timeline for FY12 Tracking and FY13 ULS Planning Cycle Rev 4

Column1	Column2	Column3	Column4	Column5	Column6	Column7	Column8	Column9	Column10	Column11	Column12	Column13	Column14	
No.	Deliverable	Owner	July	August	Sept	Oct	Nov	Dec	Jan	Feb	March	Apr	May	June
1	Identify and charge FY12 TF of Plan and Budget Cte	Sr Staff/Heidi/John		Complete										
2	Identify appropriate staff groupings for input to FY13 plan	Fern/Mike		Complete										
3	Get input from Provost - validate FY13 university goals	Rush		Complete										
4	Socialize life cycle planning process with ULS colleagues	Karen			slipped	Tentative 10/6/2011								
5	Conduct intro workshop for TF (life cycle/proj mgt/Sharepoint/define strategic options and objectives)	Karen/Heidi/John et al			slipped	Oct 14 FY13 TF & Oct 21 USTF								
6	Intro FY12 plan activities, deliverables, owners, Sharepoint site to TF	Heidi & John			Complete									
7	First quarter review of FY12 activity plan achievements	Sr Staff/Heidi/John			slipped	Scheduled 10/7/2011 and [new date]								
8	Identify FY13 strategic options for (1) public & collections services and (2) digital library (Future Search conferences for these 2 staff groups)	TF and Karen (facilitator)				slipped	Future Search FY13 - Oct 26 Future Search User Serv - Nov 2							
9	Both TFs submit input - strategic options analysis - to Sr Staff	TFs and Karen (facilitator)				slipped	By Nov 21	Note: Rush out of country Oct. 18-Nov. 19	Note: first drafts due to Karen - FY13TF Nov 15, USTF Nov 18		Complete Nov 21			
10	Complete review/revision of FY13 strategic options by Sr Staff	Sr Staff				slipped	29-Nov	at Sr Staff mtg						
11	Email feedback to ULS colleagues with thanks to TFs	Rush				slipped		5-Dec		Open Admin Council Meeting Complete				
12	Sr Staff draft outcomes-based, measurable objectives for inclusion in FY13 Plan and Budget Report and send to TFs for review	Sr Staff/Heidi/John				slipped		By Dec 13		Complete				
13	Second quarter review of FY12 activity plan achievements	Sr Staff/Heidi/John							Tentative 1/11/2011	Note: ALA MW Dallas Jan 20-24				
14	All staff workshops to review/prioritize FY13 objectives across groups	TFs and Karen (facilitator)							Tentative Jan 17 and 18		Complete Jan 17			
15	Review/revision of FY13 prioritized objectives by Sr Staff	Sr Staff							By Jan 31		Complete			
16	Email feedback to ULS colleagues	Rush								By Feb 10				
17	Sr Staff incorporate feedback and draft FY13 Plan and Budget Report	Sr Staff/Heidi/John								By Feb 17	Complete			
18	Review FY13 plan ver 1 with TFs, Plan and Budget Cte, ULS colleagues	Sr Staff/Heidi/John								Tentative Feb. 21 & 24	Complete			
	Incorporate revisions and submit FY13 plan to provost	Sr Staff								By Feb 29	Complete Feb 29			
19	Create and gain Sr Staff approval for FY13 activity list, resource plans, activity owners and timeline from FY13 plan	Karen/Heidi/John et al/Sr Staff									By March 23	Complete		
20	Review and socialize FY13 activity plan with supervisors and managers	Fern/Mike									By March 30	Partially done		
21	Third quarter review of FY12 activity plan achievements	Sr Staff/Heidi/John									Tentative April 6	Complete		
22	Email FY13 objectives, activity plan, and timeline to ULS colleagues	Rush									By April 6			
23	Supervisors/managers map objectives/plans to individual annual performance objectives	Fern/Mike/managers & supervisors										By May 14	Partially done	
24	Retire FY12 TF; convene and charge new TF of activity owners (Party for all TFs)	Rush												Complete June 26
25	Prepare report of FY12 achievements (4th qtr review); plan and announce FY13 quarterly review meetings to assess progress with activity owners TF	Sr Staff/Heidi/John												Complete